RPlan

Resource Manager

User Guide
RPlan 6.2

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RPlan Version 6.2

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Working with the Resource Manager

Introduction

The principle of requests and approvals

Resource planning focuses on two basic roles, a project role and a personnel or resource role. Project resources are planned in advance by the project supervisor in accordance with the needs of the project. Resource planning in the Resource Manager is always based on scheduling in the Schedule Manager. In other words, resource planning cannot be performed in the Resource Manager unless activities have been created and scheduled in the Schedule Manager. Depending on resource availability, the resource supervisor approves a resource as requested or with modifications, or rejects the request for a resource.

When the resource planning process culminates in resource approval, it often happens that the approved resource does not fully coincide with the original scheduling because, for example, the required resource does not have sufficient capacity.

The Schedule Manager and Resource Manager must therefore be harmonized in order to ensure correct scheduling. Scheduling must then be updated manually in the Schedule Manager.

Resource approvals can be used not only to determine resource utilization but also to calculate the required resources for a project.

Prerequisites for resource planning

A number of prerequisites must be fulfilled in order to carry out resource planning. Firstly, scheduling must have been performed in the Schedule Manager. It must also be clear which resources are available for planning and which resource supervisors are authorized to approve resources. The following prerequisites must also be satisfied.

1. Date information must be available in the schedules for which resources can be requested (see also "Working with the Schedule Manager" in the documentation RPlan Schedule Manager).
2. (Resource) pools must have been created (see also "Creating pools" in the documentation RPlan administration). The owner of the pool is the resource supervisor for all the resources in the pool.
3. Resources must have been defined (see also "Creating resources" in the documentation RPlan administration). Resource definition specifies which users are available for planning as resources.
4. Resources must have been assigned to pools (see also "Assigning resources to pools" in the documentation RPlan administration). Resource assignment specifies the resource supervisor to whom resources are assigned.
5. Resource projects must have been defined (see also "Creating projects" in the documentation RPlan administration). Resource schedules can be created in resource projects only. This is to prevent multiple scheduling of resources on different project levels.
6. Resource schedules must have been defined (see also "Creating schedules" in the documentation RPlan administration). Only these schedules can be used for resource planning.

Real-world resource planning and scenario resource planning

Resource Manager features two resource planning types – real-world resource planning and scenario resource planning. The type used for each schedule is defined in the schedule properties (see also "Creating schedules" in the documentation RPlan administration).

- **Resource planning:** The schedule is fully integrated into resource planning (can only be selected by users with resource project manager or resource sub-project manager rights for their own schedules, and generally by users with resource administrator or resource coach rights). Request can be made and approvals granted.
- **Resource scenario:** If this attribute is assigned, the schedule can be used by its owner for the trial planning of resources. In other words, only requests can be made. These are not forwarded to the resource supervisor and cannot be approved. Scenario planning does not affect the utilization dates of the assigned resources (can only be selected by users with resource project manager, resource sub-project manager, resource planner, or resource supervisor rights for their own schedules, and generally by users with resource administrator or resource coach rights)
- **No resources:** The schedule cannot be used for resource planning (can only be selected by users who have one of the rights for resource planning or resource scenario planning)

Project view and resource view

Project view

Icons used in the project tree

The icons used in the project tree have the following meaning.


Project


Resource project


Schedule


Schedule with real-world resource planning


Schedule with scenario resource planning


Schedule linked with another project


Own object

The project view shows one or more schedules with all associated activities and all request and approval data for the activities. If there are requests or approvals for an activity, they are displayed together with their associated data. This view is the main working environment of project supervisors in which they request resources and respond to approvals.

You open the project view as follows.

1. Choose the *Resource Manager* module in the RPlan bar. The selection dialog box opens.
2. Move one or more resource schedules into the selection list.
3. Confirm your selection with *OK*. The project view is opened and shows the entire period covered by the selected schedules.

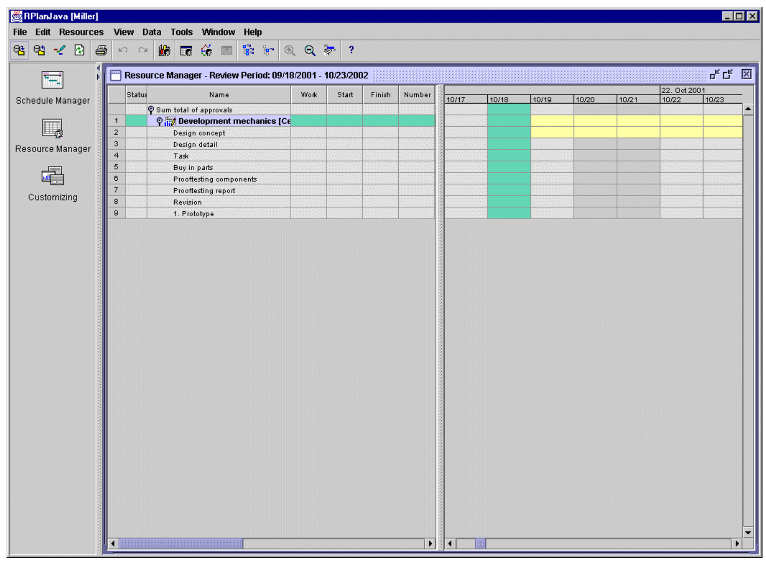


Figure 1: Project view

The project view is divided into two parts. In the left window you see the schedules, activities and requests/approvals with requested/approved resources/pools. The schedules are arranged one below the other in the order in which they were selected in the selection dialog box. The schedule names are shown against a green background to improve reader orientation.

Schedules and activities are numbered as in the Schedule Manager. The numbering of a schedule in the project view corresponds to the numbering in the working view of the Schedule Manager. This facilitates orientation when a schedule is shown simultaneously in the Schedule Manager and in the Resource Manager and the windows are tiled horizontally.

On the right the duration of the schedules and activities is shown in the calendar. Some of the fields have a colored background. The colors have the following meaning:

- Green: current date
- Yellow: duration of the activity entered in the Schedule Manager
- Gray: weekends
- Dark gray: Weekends
- White: Editable field
- Gray: Non-editable field

Resource view

Icons used in the organization tree

The icons used in the organization tree have the following meaning.

- Department
- Project team
- Pool
- User
- Resource
- Schedule
- Schedule with real-world resource planning
- Schedule with scenario resource planning
- Own object

The resource view is the main working environment of the *resource supervisor*. It shows one or more resources or pools (or a combination of both) with all their assigned requests and approvals. This view displays only schedules with real-world resource planning because approvals can be granted only for this type of planning.

You open the resource view as follows.

1. Choose the *Resource Manager* module in the RPlan bar. The selection dialog box opens.
2. Choose the *Organization* tab.
3. Move one or more resources or pools into the selection list.
4. Confirm your selection with *OK*. The *Period under Consideration* dialog box opens. The default period extends from one month before the current date to three months after the current date.
5. If required, specify a different period and click on *OK*. The resource view is opened.

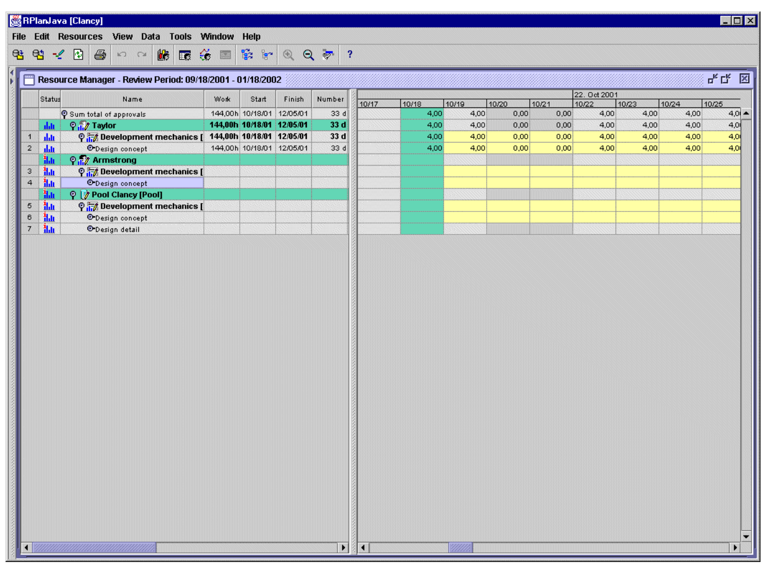


Figure 2: Resource view

The resource view is divided into two parts. In the left window you see the resources/pools and the schedules and activities for which the resources/pools were requested/approved. The view is arranged according to resources/pools in the order in which they were selected in the selection dialog box. It provides the resource supervisor with an overview of all requests/approvals for each resource/pool. The resource/pool names are shown against a green background to improve reader orientation.

Resource-specific resources are shown a second time below the *Approvals/Requests* fields because the resources can belong to different pools during the period requested.

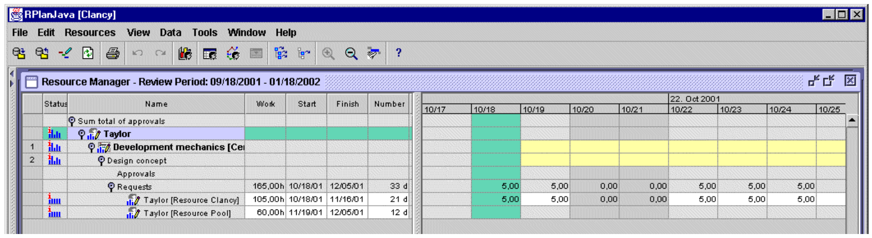


Figure 3: The resource 'Taylor' belongs to different pools during the period requested

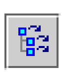
On the right the duration of the schedules and activities is shown in the calendar. Some of the fields have a colored background. The colors have the following meaning:

- Green: current date
- Yellow: duration of the activity entered in the Schedule Manager
- Gray: weekends
- Dark gray: Weekends
- White: Editable field
- Gray: Non-editable field

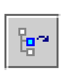
Showing/hiding outline levels

Depending on whether you are interested in an overview or in details, you can show or hide lower outline levels. You do this in various ways.

Double-click on a resource schedule or activity in the *Name* column in order to show or hide the lower outline levels. A single click on the outline level icon also shows or hides the lower outline levels of an element.



Choose the menu items *View* → *Expand all* to show all outline levels or alternatively click on the *Expand all* button.



You can show lower outline levels for a schedule, activity or request/approval by highlighting the appropriate row and choosing *View* → *Expand subtree* or clicking on the *Expand subtree* button.

You can also show various outline levels.

To do so, choose *View* → *Level* and one of the menu items displayed to show the appropriate outline level for the entire view.

Left part of the screen

The left part of the screen shows the same arrangement of columns in the project view and in the resource view.

- **Status** – Shows the status of a request/approval. The icons displayed here indicate whether you are authorized to process a request/approval or whether any change has been made to a request/approval.

   The relevant partner has not yet responded to the last action.

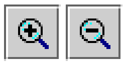
   The partner was the last person to process the request/approval.

   The request/approval has been deleted by one of the two partners, but deletion has not yet been confirmed.

   The review period selected for the resource is smaller than the request/approval period. Some of the requests/approvals are outside the selected review period.

- **Name** – This column lists the schedules and activities with their resources/pools and requests/approvals.
- **Work** – Total work for the row.
- **Start** – Start of work with respect to the period under consideration. Start means, for example, the earliest assigned approval or request. If this is before the start of the period under consideration, the start of the latter is shown.
- **Finish** – End of work with respect to the period under consideration. Finish means, for example, the latest assigned request or approval. If this is after the end of the period under consideration, the end of the latter is shown.
- **Number** – Number of days requested or approved in the period under consideration.
- **Task start** – Start of the (earliest) activity or schedule according to the Schedule Manager.
- **Task finish** – End of the (latest) activity or schedule according to the Schedule Manager.
- **Task duration** – Period of time between the start and finish of a schedule or activity.
- **Remark** – Comments from the *Remark* field relating to activities or requests/approvals. This column also shows messages from the requesting/approving party (refer also to "Sending a message" on page 20).

Zooming in/out



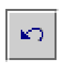
The timescale in the calendar view can be altered to show, for example, the total duration of a schedule. Clicking on the *Minus* magnifying glass icon zooms in on the timescale, and clicking on the *Plus* magnifying glass icon zooms out.

The timescale can be changed in four preconfigured levels:

- Weekly view
- Monthly view
- Quarterly view
- Yearly view

To move, for example, from the yearly view to the monthly view, you click twice on the *Plus* magnifying glass icon to zoom in. Conversely, clicking on the *Minus* magnifying glass icon zooms out one level. You can also zoom in or out on the timescale using the menu items *View* → *Zoom in* and *View* → *Zoom out*.

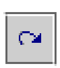
Undo



All actions you perform in the planning interface of RPlan can be immediately undone in ten steps. Simply click on the *Undo* icon to cancel an action.

Saved actions
Note that saved actions can no longer be reversed (undone).

Redo



Sometimes it may be necessary to redo actions that you have undone. Simply click on the *Redo* icon to repeat the action you have just undone.

Saved actions
Note that undone and saved actions can no longer be restored (redone).

Go To

A very simple way of moving an object (activity bar) into the visible area of the right window is the *Go To* function. Highlight the desired activity in the table and click on the *Go To* icon. The schedule bar of the highlighted activity is moved into the display area. You can also move an object into the display area using the menu items *View* → *Go to.*

Request and approvals

Requesting resources

Authorized persons

Own schedules

- Schedule owner

Own and foreign schedules

- RM Administrator
- RM Coach

For information on authorizations refer also to the "RPlan Administration" manual.

The first step in planning resources for a project is for the project supervisor (requesting party) to request the required resources. Before this can be done, a schedule with scheduling data must already have been created. It is on the basis of this schedule that resources are planned.

1. Load the desired schedule in the project view.
2. Highlight an activity in the project view and choose the menu items *Resources* → *Requesting party* → *Create/edit request*. The *Request/Approval* dialog box opens.

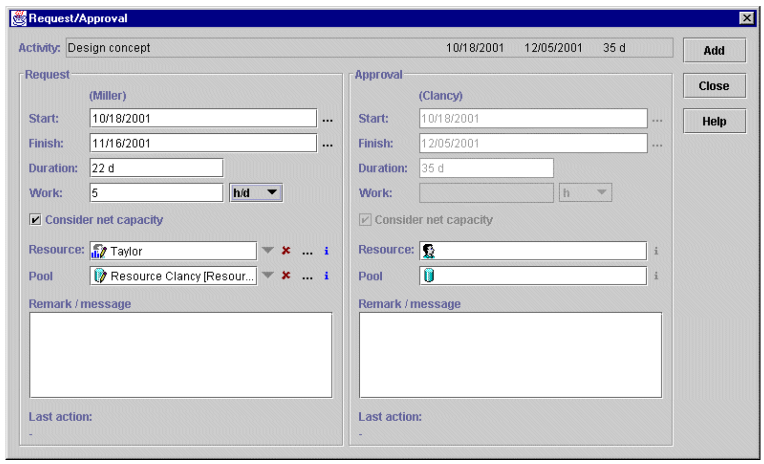


Figure 4: Requesting resources

Work quantity

The work quantity is the time needed to perform a task. Unlike the duration, the work quantity reflects the actual work effort involved. For example, if the duration of a task is set at 1 week and 2 hours per day are assigned to the task, the work quantity is 10 hours.

3. The Schedule Manager default data is displayed for the task shown in the *Activity* field. If the period requested and the period of the activity differ, enter a start date and finish date for the request in the corresponding fields of the *Request* group.
4. Enter the work quantity you want to request in the *Work* field.

   Choose the entry *h/d* in the selection list if you want to enter the work quantity for the period requested in hours per day. Choose the entry *h* (default) if you want to enter the entire work quantity for the period requested in hours. The work quantity is then distributed evenly over the duration of the request. For example, a request for 5 days with a work quantity of 15 hours results in 3 hours per day.

Net capacity

Each resource has a certain capacity in terms of time (gross capacity). This capacity is based on the assigned calendar and working time model. The net capacity is the gross capacity as changed by capacity modifiers.

Capacity modifiers are absences (vacation) and additional attendance (overtime) which affect the gross capacity and non-project workloads (routine duties) which represent an ongoing workload and do not affect the net capacity (see "Assigning capacity modifiers" in the RPlan Administration manual).

If the duration is entered in the unit "d", the period is distributed over all days except Saturday and Sunday. If the duration is entered in the unit "ed" for "elapsed days", the period is distributed over all days.

5. Choose whether the net capacity should be taken into account when distributing the work quantity.

   If you select the *Consider net capacity* option, the net capacity of the resource or pool is also taken into account. The number of working days in accordance with the request (Schedule Manager calendar) is reduced by days on which the net capacity is zero (e.g. vacation days, absences).

   If you do **not** select the *Consider net capacity* option, only the calendar of the Schedule Manager (Monday to Friday) is taken into account.

Resource-specific vs. pool-specific planning

In resource-specific planning each resource can be requested and approved individually.

In pool-specific planning only a certain work quantity can be requested and approved in a pool without specifying which resource in the pool is to perform the activity.

6. **Resource-specific planning:** Click on the selection button for *Resource* and choose the desired resource in the organization tree. You are prompted to choose a pool if the resource is assigned to more than one pool during the period requested.

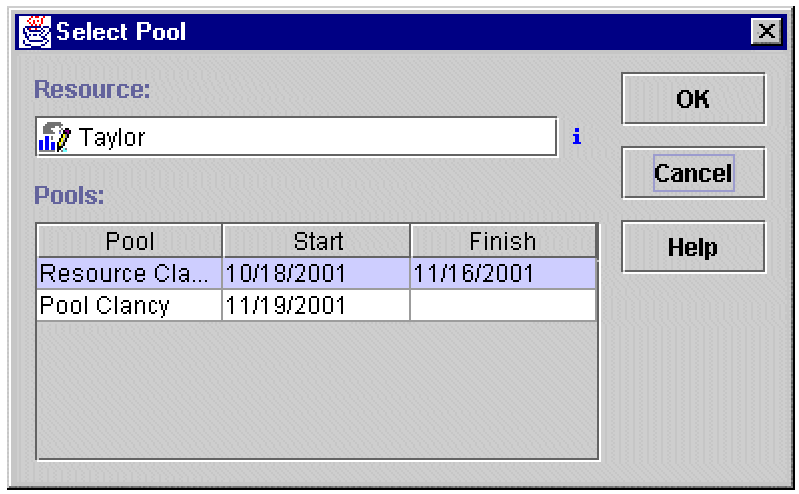


Figure 5 Selecting a pool assignment

Duration of requested resource

The duration of the requested resource is not dependent on the duration of the underlying activity. A request can be created only for a **single** duration in the case of a summary task or milestone.

   Pool-specific planning: Click on the selection button for *Pool* and choose the desired pool in the organization tree.

7. You can enter an optional description of the request in the *Remark* field. The description is displayed in the *Remark* column in the resource or project view.

8. Click on *Add* to complete your request for a new resource. The *Request/Approval* dialog box remains open so that you can continue to add more requests. Click on *Close* when you have requested all the resources you need. Once you have closed the *Request/Approval* dialog box, the request data is displayed in the project view.

9. Save your data using *File →Save*. Your request takes effect and can also be accessed by the resource supervisor who is informed of the new request by means of the resource icon in the status column. The request is also displayed on the *Request/Approval* tab in the selection dialog box.

Resource availability

If you want to take the capacity of the resource into account when you request the resource, you can obtain information on resource availability in the availability overview (see "Availability view" on page 23).

Multiple requests for resources/pools

A resource or pool can be requested repeatedly for each activity. If, for example, you need a resource for a period at the beginning of an activity and then again at the end of the activity, you can request the resource separately for both periods. If you are using resource-specific planning, you can request a resource repeatedly if the resource changes its pool during the request period. In this case you can create a request for each pool assignment.

In pool-specific planning you can also create requests for periods in which no resource is assigned to the pool.

Accepting approvals

Approvals can be granted even if no requests have been made. For example, an approval already exists and you want to create a request for it simply and quickly.

Accepting approvals using the *Request/Approval* dialog box
Highlight the approval for which you want to create a request and call the *Request/Approval* dialog box. Click on the *Accept* button. The approval information is transferred unchanged to the *Request* area. Click on *OK*. The status of the *Consider net capacity* indicator determines whether the work is distributed equally over the available days. The profile may change (see "Editing requests/approvals directly" on page 18).

Accepting approvals using menu items
You can create requests for approvals even quicker using the context menu. Highlight the approvals and choose *Accept (requesting party)* in the context menu or choose the menu items *Resources* → *Requesting party* → *Accept*. When the work is distributed over the available days, the net capacity of your partner is accommodated in the best possible way.

Approving resources

Authorized persons

Own resources

- Pool owner

Own and foreign resources

- RM Administrator
- RM Coach

For information on authorizations refer also to the "RPlan Administration" manual.

A resource is generally approved by the resource supervisor (approving party) in response to a request for the resource. However, an activity can also be approved without the need for a prior request.

1. Load the desired resource/pool in the resource view.
2. Highlight an activity in the resource view and choose the menu items *Resources* → *Approving party* → *Create/edit approval*. The *Request/Approval* dialog box opens.
3. If you want to change the default period approved, enter a start date and a finish date for the approval in the corresponding fields in the *Approval* group.

Resource availability

To create coordinated approvals, it is important to identify and analyze free capacity and capacity overload in the resources and pools. The availability view provides the information you need to do this (see "Availability view" on page 23.

4. Enter the work quantity you want to approve in the *Work* field.

   Choose the entry *h/d* in the selection list if you want to enter the work quantity for the period approved in hours per day. Choose the entry *h* (default) if you want to enter the entire work quantity for the period approved in hours. The work quantity is then distributed evenly over the duration of the approval. For example, an approval for 5 days with a work quantity of 15 hours results in 3 hours per day.

   The *Consider net capacity* option is always selected for approval of resource-specific resources. The work quantity can be distributed only over days on which the net capacity of the resource is greater than zero. In the case of pool-specific resources, you can deselect the option if you want to approve pools without resource assignments.

   If the duration is entered in the unit "d", the period is distributed over all days except Saturday and Sunday. If the duration is entered in the unit "ed" for "elapsed days", the period is distributed over all days. Which unit is valid here is specified in the Schedule Manager when defining the duration of an activity. The unit cannot be changed in the Resource Manager.

5. You can enter an optional description of the approval below *Remark*. Confirm your approval using *Add*. The approval data is displayed in the resource or project view.
6. Save your data using *File* → *Save*. Your approval takes effect and can also be accessed by the requesting party who is informed of the new approval by means of a red resource icon in the status column.

Multiple approvals for resources/pools

A resource or pool can be approved repeatedly for each activity. If, for example, you need a resource for a period at the beginning of an activity and then again at the end of the activity, you can approve the resource separately for both periods. If you are using resource-specific planning, you can approve a resource repeatedly if the resource changes its pool during the approval period. In this case you can create an approval for each pool assignment.

In pool-specific planning you cannot create an approval for periods in which no resource is assigned to the pool.

Accepting requests

You can provisionally approve resources in a quick and simple way, and change the approval later if necessary.

For example, you receive a request which you are able to approve because you know your resources/pools have free capacity. You can accept requests in one of two ways.

Accepting requests using the *Request/Approval* dialog box
Highlight the request you want to approve and call the *Request/Approval* dialog box using the menu items *Resources* → *Approving party* → *Create/edit approval*. Click on the *Accept* button. The request information is transferred unchanged to the Approval area. Click on *OK*. The status of the *Consider net*

capacity indicator (see "Editing requests/approvals directly" on page 18)determines whether the work is distributed equally over the available days.

Accepting requests using menu items

You can approve requests even quicker using menu items. Highlight the request you want to approve and choose *Accept (approving party)* in the context menu or choose the menu items *Resources → Approving party → Accept*. When the work is distributed over the available days, the net capacity of your partner is accommodated in the best possible way.

Changing requests or approvals

If you have submitted a request or granted an approval and now want to change the associated work quantity or work time, you proceed as follows.

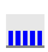
1. Choose a resource schedule, resource or pool and open the corresponding view.
2. Highlight the request or approval whose data you want to change and choose the menu items *Resources → Requesting party → Create/edit request* or *Resources → Approving party → Create/edit approval*. The *Request/Approval* dialog box opens.
3. Enter the new request or approval data and confirm your input.
4. Save your data using *File → Save*. Your request/approval takes effect and can also be accessed by your appropriate partner who is informed of the changed request/approval by means of a red resource icon in the status column.

Editing requests/approvals directly

You can change requests and approvals not only using the Request/Approval dialog box but also directly in the project and resource views. The fields containing request/approval data in the left half of each view and in the calendar are editable. The editable fields are white. You edit them by double-clicking on them or highlighting them and entering your data.

In the left half of each view you can edit the Work, Start, Finish and Duration fields in the rows for the requested or approved resources. You do not need to call the Request/Approval dialog box in order to change the data of requests or approvals.

You can also edit existing data or enter new data in the calendar. It is also possible to edit a calendar field when the calendar view is zoomed in.



When you create or edit requests/approvals in the Request/Approval dialog box, the work quantities are distributed evenly over the days of the appropriate periods. This is indicated in the status icon by means of an even profile of the histogram columns.

When you edit requests/approvals directly in the calendar, the work quantity is no longer distributed evenly over the days of the appropriate periods. This is indicated in the status icon by means of an uneven profile of the histogram columns. This is a user-defined profile.

Changing work quantities
You change the work quantity in the Work field on the left. The work quantity of each day is multiplied by a conversion factor in order to calculate the new work quantity for each day. The profile is kept.

Changing the start date
You change the start date in the Start field. This shifts the request/approval but the number of days remains unchanged. If the Consider net capacity indicator is activated, a 0 is not shifted. If the indicator is deactivated or is user-defined, each 0 is shifted.

Changing the finish date
You change the finish data in the Finish field. If the new finish date is before the old finish date, the duration is truncated at the new finish date. The work quantity and the number of days are recalculated.

If the new finish date is after the old finish date, the system automatically fills all new fields with the value of the old finish date. The work quantity and the number of days are recalculated.

Whether the net capacity is taken into account depends on the setting you have made.

Changing the number of days
You change the number of days in the Number field. The finish date is recalculated taking the status of the *Consider net capacity* indicator into account.

If the new finish date is before the old finish date, the duration is truncated at the new finish date. The work quantity and the number of days are recalculated.

If the new finish date is after the old finish date, the system automatically fills all new fields with the value of the old finish date. The work quantity and the number of days are recalculated.

Changing fields in the calendar
You can change the work quantity for the individual days in the fields for requests/approvals. Changing these fields causes the work distribution profile to change on a user-specific basis. The status of the *Consider net capacity* indicator in the *Request/Approval* dialog box is also set to user-defined**.**

If the calendar view is zoomed, you can enter a work quantity. If the calendar week view is displayed and you enter a work quantity, the work is distributed as follows:

- If no work quantity has already been entered for the week, the work is distributed over all the days.
- If a work quantity has already been entered for some of the days, the work is distributed over these days only.

Status of the Consider net capacity indicator

The Consider net capacity indicator in the Request/Approval dialog box can have one of three different statuses:

Status is activated – is set in the Request/Approval dialog box (default)

Status is deactivated – is set in the Request/Approval dialog box

Status is user-defined – the status is set to user-defined when a change is made to the work quantity in the calendar

Responding to a request or approval

If you, as resource supervisor (approving party), receive a request or, as project supervisor (requesting party), receive an approval, you can respond in different ways. Either you respond with a request or approval as described above, or you choose one of the following options.

Acknowledgment

You acknowledge a request or approval to indicate that you have read the request or approval but have not yet decided on your response. After acknowledgment the corresponding request/approval is no longer labeled with a red "i".

To acknowledge a request/approval, highlight the request/approval and choose the menu items *Resources* → *Requesting party* → *Acknowledge* or *Resources* → *Approving party* → *Acknowledge*. The acknowledgment is not written to the database until you save.

Sending a message

You send a message to your partner by highlighting the appropriate request/approval and choosing the menu items *Resources* → *Requesting party* → *Send message* or *Resources* → *Approving party* → *Send message*. The *Request/Approval* dialog box opens. Type your message in the *Remark* field and confirm your input with *OK*.

The message is not written to the database until you save. Your partner is informed that there is a message for him/her by means of the red "i" in the resource icon. The message can then be read in the *Remark* column or in the log (see "Log" on page 21).

Deleting requests/approvals

You can reject a request/approval or delete your own request/approval by highlighting the appropriate request/approval and choosing the menu items *Resources* → *Requesting party* → *Delete* or *Resources* → *Approving party* → *Delete*.

The resource icon is immediately removed from the table for the logged-on user. At the partner end the request/approval is initially retained so that the partner is aware of the action. If the partner has not yet entered any data for the request/approval, the request/approval is irretrievably deleted. The deletion is indicated by a crossed, red resource icon in the status column. The deletion is not written to the database until you save.

Log

Log

Note that the log always reflects the status at the time of the last save. Changes made since the last save are not shown. When a request/approval is deleted, the associated log entries are also deleted. As a result, logs for schedules and resources are changed retroactively.

When you submit requests or grant approvals, data on schedules, tasks and resources is logged. You can print out this data so that you can trace back a variety of past actions on paper.

Highlight the schedule, task or resource/pool whose log you want to display. Choose the menu items *Resources* → *Log* or *Log* in the context menu.

If you have selected the log of a schedule or task, the print preview is displayed immediately. If you have selected a resource, you are prompted to restrict the period for the resource.

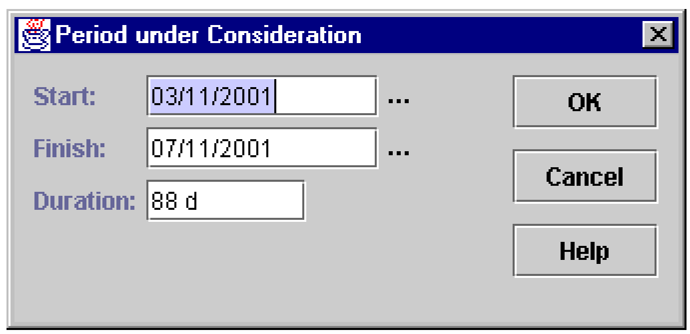


Figure 6: Restricting the period under consideration for the log

The print preview for the log is displayed. You are first shown an overview divided into three areas:

- General information on the schedule, task or resource is shown in the log header.

  If the log is for a schedule or an activity you are shown information on the project, schedule, activity, pool and/or resource. If the log is for a resource/pool you are shown information on the review period, department, pool and/or resource.

- The current status of all approvals is shown in the *Approval* area.

  The name of the pool owner is displayed in the name column if the log is for a resource/pool.

- The current status of requests is shown in the *Request* area.

  The name of the schedule owner is displayed in the name column if the log is for a schedule.

To view the individual actions, click on the *Page setup* button and then select the *Print history* function.

The main body of the Log lists all actions performed with regard to the schedule, resource/pool and activity in chronological order (oldest action is shown first in the log). The Performed by column shows the name of the user who performed the action.

You can read the desired information in the print preview of the log or print out the log (see "Printing logs" on page 42).

Project graphic

The project graphic shows the requests and approvals for schedules and activities in graphical form. You can call the graphic from within the project and resource views. To display this data, highlight a schedule or the top outline level *All* in the project view. In the resource view highlight a resource/pool or the top outline level *All*. Then click on the *Project graphic* icon or choose the menu items *View* → *Project graphic*. A second window is opened for the bar chart diagram.

Project graphic for several objects

If you highlight several objects (CTRL + left mouse button), the project graphic is shown for all the highlighted objects.

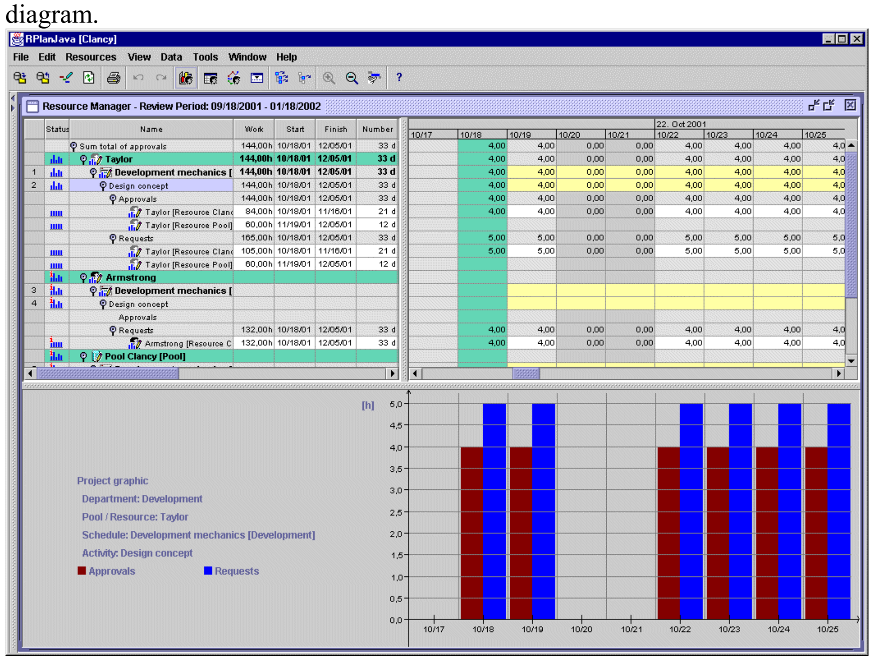


Figure 7: Bar chart diagram for requests/approvals

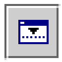
The graphic shows you the totals for requests and approvals in terms of time units/currency for the selected outline level.

Key for project graphics

The key indicates specific information on the objects to which the project graphic relates.

If the project graphic relates to the top outline level or for several objects, the names of the individual objects are not shown in the key. Instead a general note relating to the selected objects is provided.

A page is appended to each print job you submit for a project graphic. This page provides information on the objects of the project graphic.



You close the standard graphic by means of the *Remove split* icon or by choosing the menu items *View* → *Remove split*.

Availability view

Authorized persons

Gross capacity, attendance and absences and non-project workloads are visible only to authorized persons.

Own and foreign pools:

- RM Administrator
- RM Org. Manager

Own pools:

- Pool owner

Before resources can be approved, it is important to know their levels of utilization (i.e. where there is free capacity and where there are capacity overloads). The availability table provides an overview of capacities and their levels of utilization and therefore gives you full control over your approvals.

In the project and resource views you can display an availability view, in either tabular or bar chart form, for resources and – in pool-specific planning – for pools.

To display this view, highlight the desired resource/pool. Choose the menu items *View* → *Availability table* or *Availability graphic*. A second window is displayed for the table or graphic. You close this window using *View* → *Remove split*.

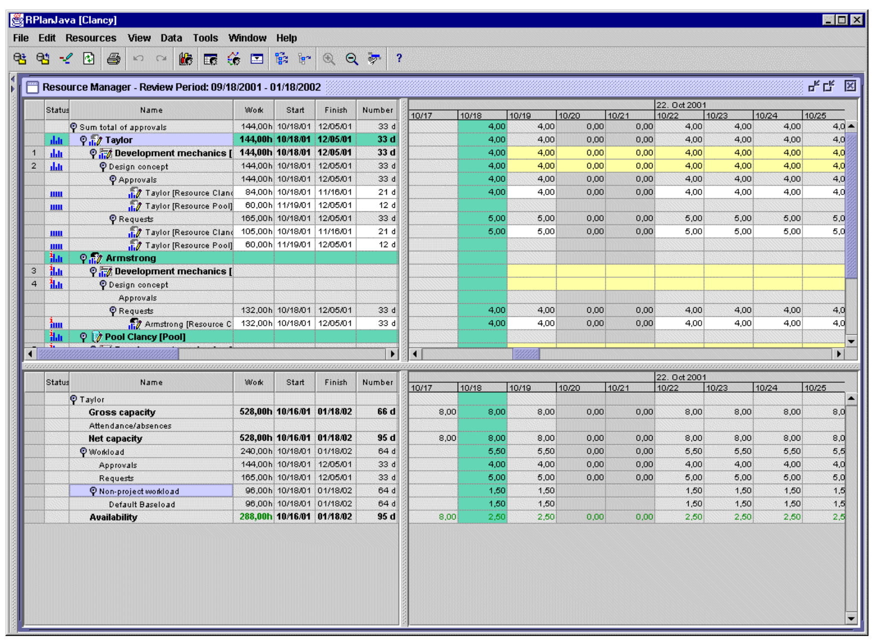


Figure 8: Availability view

The availability table provides detailed information on the capacity and utilization of resources and pools. These values are used to calculate the resource/pool capacity still available. The table contains the following objects.

- **Gross capacity:** This is the capacity of a resource calculated on the basis of the calendar and working time model assigned to the resource (see "Creating resources" in the "RPlan Administration" manual). The value displayed is the gross capacity for the period under consideration.
  Example: Given a 5-day working week and an 8-hour day, the gross capacity of the staff member is 40 hours per week.
- **Absences and attendance:** These are modifiers which affect the capacity of a resource (see "Assigning capacity modifiers" in the "RPlan Administration" manual). A negative, red value indicates the extent of any absences.
  Example: In this week, the staff member is absent for 8 hours (vacation) and has an additional attendance of 2 hours (overtime).
- **Net capacity:** The net capacity is the gross capacity as changed by the capacity modifiers. The value displayed is the net capacity for the period under consideration.
  Example: The net capacity of the staff member in this week is 34 hours (gross capacity of 40 hours with an absence of 8 hours and an additional attendance of 2 hours).

"Not available (n.a.)"

Approval for a pool-specific resource always relates to the pool and not to a specific resource. As a result, no approval value is available for a pool-specific resource in the *Approval* field in the availability table. Instead, the field displays "n.a." for "not available". Logically, in a case like this, no values are available for the *Workload* and *Availability* fields. If a resource-specific resource is displayed together with a pool-specific resource, no value can be calculated for their total. In the availability graphic and standard graphic, "n.a." is also used instead of displaying the approval bar chart.

- **Workload:** This is the total of all approvals for a resource/pool and the non-project workloads.
  Example: The workload amounts to 14 hours (made up of 10 hours for approvals and 4 hours for non-project workload).
- **Approvals:** This is the value of the approvals.
  Example: Two approvals, each of 5 hours, have been granted with respect to this staff member.
- **Requests**: Shows the value of the requests. This object is not displayed by default but only when called using the menu items *View → Availability – show requests* or using the context menu.
- **Non-project workloads:** This reflects resource utilization for tasks that cannot be assigned to any project (see "Assigning capacity modifiers" in the "RPlan Administration" manual).
  Example: The staff member has a non-project workload of 1 hour per day. This corresponds to a non-project workload of 4 hours for this week.
- **Availability:** This is the net capacity as modified by the workload and the non-project workloads. A positive, green value indicates the free capacity of a resource. A negative, red value indicates capacity overload.
  Example: The staff member has free capacity of 20 hours this week (difference between net capacity of 34 hours and workload of 14 hours).
- **Scenario approvals**: Represents the value (in terms of time or currency) of the requests or approvals transferred as scenario approvals (see "Setting up availability scenarios" on page 25).
  Example: Approvals of resource B are transferred to resource A for trial purposes.
- **Scenario availability**: Shows the changed availability after account has been taken of the scenario approvals (see "Setting up availability scenarios" on page 25).
  Example: Resource A has an availability of 20 hours. Scenario approvals of 10 hours are transferred to the resource. The scenario availability is now 10 hours. In a real-world situation these 10 hours could be approved for resource A.

In the availability graphic the approvals and non-project workloads are shown in diagram form. The gross and net capacity is also displayed.

Key for availability graphics
The key indicates specific information on the objects to which the availability graphic relates.

If the availability graphic relates to the top outline level or for several objects, the names of the individual objects are not shown in the key. Instead a general note relating to the selected objects is provided.

A page is appended to each print job you submit for an availability graphic. This page provides information on the objects of the availability graphic.

Showing requests
You can show requests in the current availability table or graphic. To do so, choose *Availability – show requests* in the context menu or choose the menu items *View* → *Availability – show requests*. You hide the requests by choosing the menu items again.

Calendar, working time model, capacity modifiers

- **Working time model:** A working time model must be assigned to each resource via the master data. This model specifies the weekly working hours and a default value indicating how these hours are distributed over each day. If the working hours of a resource change, a different working time model can be assigned to the resource. However, the assigned times must not overlap.

- **Calendar:** A calendar must be assigned to each resource via the master data. The calendar includes exception days (e.g. public holidays) which reduce the working hours indicated by the working time model.

- **Capacity modifiers**: Capacity modifiers are absences (e.g. vacation) and additional attendance (e.g. overtime) which affect the gross capacity, and non-project workloads (routine duties) which represent an ongoing workload but have no effect on the net capacity.

Setting up availability scenarios

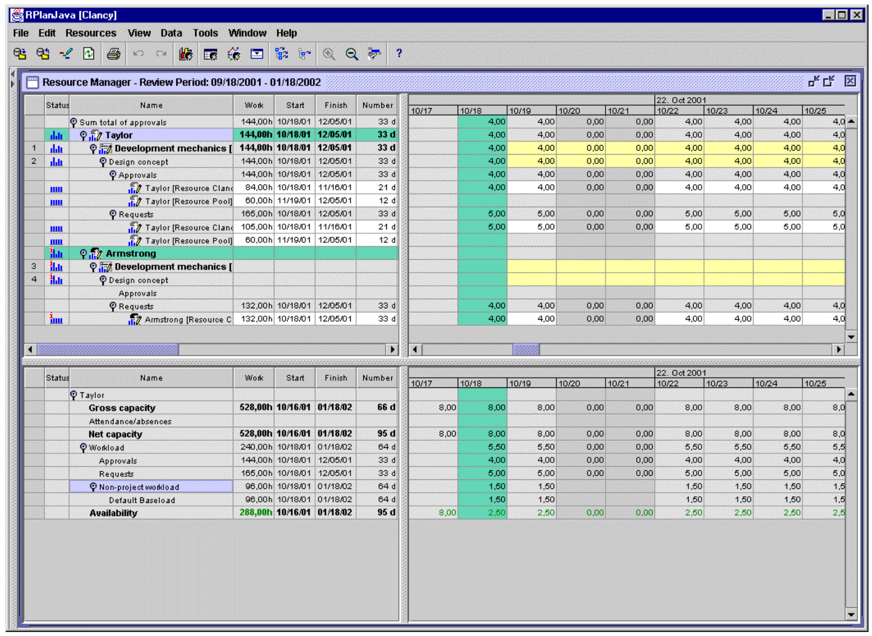
You can illustrate the transfer of a request or approval of a resource/pool to a different resource/pool in the form of a scenario approval. The system uses this scenario approval to calculate how the availability of the resource/pool to which the scenario approval is applied changes. The changed availability is then shown in the availability scenario.

The requests or approvals of a resource/pool, schedule or activity can be shown as scenario approvals. Which requests or approvals are included in the scenario approval depends on the selected object. All requests and approvals below the selected object are always included as scenario approvals.

You can display the availability scenario in tabular or graphic form.

The following example illustrates how an availability scenario involving two resources is set up. You want to transfer the request for resource 1 to resource 2 as a scenario approval.

1. Load both resources in the resource view. If necessary, limit the review period to the period of the activity.
2. Show the availability table for resource 2.



3. Highlight resource 1 and choose Availability scenario based on requests in the context menu. You also have the option of choosing the menu items *Data → Availability scenario based on requests*.

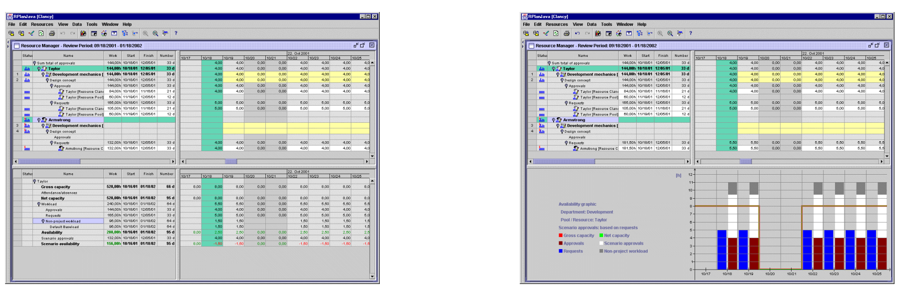


Figure 9: Identical fictive approvals in the availability table and availability graphic

Using the scenario approval and the availability scenario you can now check how the availability of resource 2 changes when the work quantity of the requests resource 1 are transferred to it.

Scenario approvals in the availability table

The availability table also shows scenario approvals and the availability scenario.

The Scenario approvals field shows the value of the requests or approvals transferred as scenario approvals. This helps you decide whether real-world approval of the scenario approvals is possible or meaningful.

In the Availability scenario field you see the effect the scenario approvals would have on the availability of the resource/pool.

Scenario approvals in the availability graphic
In the availability graphic the approval bar for resources with scenario approvals is formatted as follows. The real-world approvals for the resource are shown in the lower area, the scenario approvals in the central area, and the non-working loads in the upper area.

The availability scenario provides you with an overview and helps you decide quickly and simply whether an approval for the resource/pool is worthwhile.

You hide the availability scenario by choosing the menu items *Data* → *No availability scenario*.

Displaying totals for requests

By default, the totals for approvals are displayed on the left-hand side of the project view next to the activities/schedules and on the top outline level, or on the left-hand side of the resource view next to the resources/pools. This display can be toggled to show the totals for requests.

Choose the menu items *Data* → *Totals for requests*. The totals for requests are shown. To toggle to the display of totals for approvals, choose the menu items *Data* → *Totals for approvals*. The top outline level shows which totals are currently displayed.

Totals marked with "!"
When you display totals for requests or approvals, values are marked with "!" if a resource and the pool (resource-specific) to which the resource belongs are loaded simultaneously in a resource view. For example, an approval is displayed for the resource and also for the pool but is counted once only.

Defining the time unit

By default, the duration of the work and the distribution of the work in the calendar and in the project, resource, and availability views is shown in hours. You can change this time unit to suit your own needs. Choose the menu items *Data* → *Time units*. The *Time Units* dialog box opens.

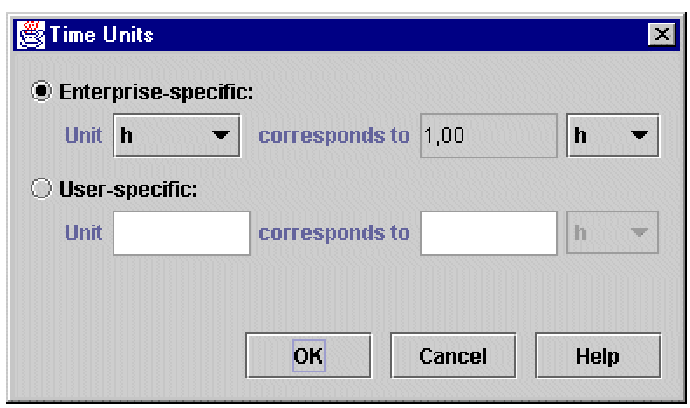


Figure 10: Defining time units

Time units

The settings defined in the Time Units dialog box are not transferred to the Request/Approval dialog box.

Here you can either choose the system's own time units or define your own time unit.

Enterprise-specific time units
Enterprise-specific time units are defined by your system administrator. You can access them using the *Enterprise-specific* option. Contact your system administrator if you are not clear about the values and designations used.

Choose the time unit you want in the *Unit* selection list and click on *OK*.

User-specific time unit
If you want a time unit other than the predefined units for your project or if you want to use a custom time unit for any other reason, click on the *User-specific* option in the *Time Units* dialog box. Enter the designation for your time unit in the *Unit* field. Enter the calculation basis in the "corresponds to" field for the time unit and choose the time unit from the adjacent selection list. The time units available in this list are defined by your system administrator. Click on *OK* to apply your time unit. You can set only one user-defined time unit at any one time. If you want to change the calculation basis for the time unit, enter the new value in the "corresponds to" field and/or change the time unit in the selection list and click on *OK*.

Once you have chosen a new enterprise-specific or user-specific time unit, the values in the Work column on the left and in the calendar are converted immediately into the new time unit and displayed accordingly. If the project graphic, availability table or availability graphic is displayed, existing values are likewise converted into the new time unit.

Displaying costs

This function lets you calculate and display the resource costs for the current view simply and quickly. When you load and expand all schedules of a project, you are shown a project overview of the overall costs right down to the requests and approvals branches. You can, of course, restrict the calculation and display of costs to individual schedules or resources/pools.

The totals for approvals or requests are included in the cost calculation, depending on which totals display is currently selected (see "Displaying totals for requests" on page 27). The costs are recalculated when you toggle between the totals for approvals and the totals for requests display.

The costs are always calculated for the current view. If the project graphic, availability table or availability graphic is displayed, the costs are also calculated for the values shown in the graphic or table.

Choose the menu items *Data* → *Costs*. The *Costs* dialog box opens.

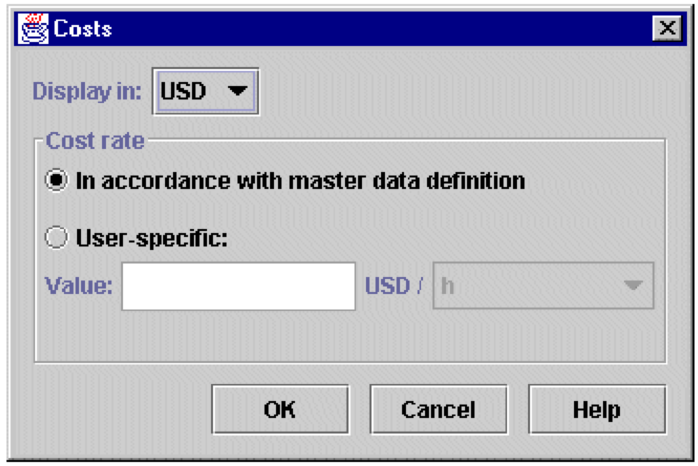


Figure 11: Defining the cost rate for the cost calculation

You choose the currency for the cost rate to be used as the calculation basis in the *Display in* selection list. The currencies are defined by your system administrator.

You can calculate the costs on the basis of the cost rate in the resource master data or alternatively you can define your own cost rate.

Cost rate in accordance with master data definition

To calculate the costs on the basis of the resource cost rates, choose the currency in which you want to calculate and display costs in the *Display in* selection list and then click on *OK*.

User-specific cost rate

Click on the *User-specific* option in order to calculate the costs using a user-specific cost rate. Choose the currency in which you want to calculate the costs in the *Display in* selection list. Enter the amount in the *Value* field and choose the time unit on the basis of which the cost rate is to be calculated in the selection list. Click on *OK* to start the cost calculation.

No calculations can be made for pool-specific pools which are empty or which have gaps between resource assignments in the review period. "n. a." is displayed in such cases.

The cost rate used for pool-specific pools whose resources have different cost rates is the average of the cost rates in the pool. The costs for the pool are calculated on the basis of this average cost rate.

If the currencies of resource cost rates differ from the currency selected for the cost calculation, the calculated values are converted into the selected display currency.

To show time units again, choose the menu items *Data* → *Time units* and then select the time unit you want in the *Time Units* dialog box.

Date and resource information

More detailed information on the Schedule Manager is provided in the RPlan Schedule Manager manual.

As a result of resource planning, the dates of the Schedule Manager and the Resource Manager may differ. The two modules must be harmonized in order to achieve correct scheduling. It is therefore necessary to make manual adjustments to the scheduling in the Schedule Manager. To do this, open the relevant schedule both in the Schedule Manager and in the Resource Manager and position the windows one above the other using *Window → Arrange all*. Edit the time schedule so that it matches the resource schedule.

Request/approval information system

Request/approval tab

Resource scenario

Resource schedules with the *resource scenario* attribute are not included in the information system because only trial requests are created for the schedules.

RPlan supports your work with requests/approvals by means of an information system which displays data on requests/approvals which concern the user logged on.

When you start the Resource Manager, you are informed by an appropriate message if a request/approval which concerns you (as the requesting or approving party) has changed.

If you want to obtain immediate information on changes to requests/approvals, click on *Yes*. This takes you to the *Request/approvals* tab in the selection dialog box. This tab shows an overview of all (new/changed) requests/approvals which concern you and therefore allows you to respond quickly to new situations. Depending on the user logged on, the resource or project view is displayed by default.

Resource view

This view is shown automatically when a user with authorization to submit requests and grant approvals logs on.

- **Resource view:** This view is displayed when the user logs on as an approving party. It lists the resources/pools which concern the user. The resources/pools can be expanded to display associated activities and schedules on lower levels and to respond to changes.
- **Project view:** This view is displayed when the user logs on as a requesting party. The schedules for whose activities there are requests/approvals are displayed. The schedules can be expanded to display activities and associated resources/pools on lower levels and to respond to changes.

The icons shown in both views indicate whether you are authorized to process a request/approval or whether you made the last change to a request/approval.


For example, a request/approval has changed for a resource/pool. The user logged on is authorized to process a request/approval for the resource/pool.


For example, a request/approval for a schedule has changed. The user logged on is authorized to process the request/approval.

Filtering the display of requests/approvals

This function lets you filter the contents of the displayed requests/approvals. It is of particular benefit if you are involved in a large number of requests/approvals.

Display types

If there are no requests/approvals with the status *New/changed* for a user when he/she logs on, the *All* view filter is active by default. If, however, there is a new or changed request/approval, the *New/changed* filter is activated.

If you respond to or acknowledge a request/approval when the *New/changed* filter is active (see "Processing requests/approvals" on page 31), the request/approval is immediately hidden in the view. It can be redisplayed by activating the *All* filter.

Save

Changes to requests/approvals that you make in the information system are written to the database immediately and need not be saved explicitly.

- **All:** All requests/approvals that concern you are displayed.
- **New/changed:** Only new and/or changed (by your partner) requests and approvals are displayed.
- **Critical:** Only *critical* requests/approvals are displayed. A request/approval is *critical* in the view of the requesting party if the approving party has not yet responded to a request by the time the requesting party logs on again, or if the approving party has deleted an approval. A request/approval is *critical* in the view of the approving party only if the requesting party has deleted his/her request.

Processing requests/approvals

At this point you can respond or make changes to a request/approval. All the options listed below are accessible only via the context menu.

- Respond or make changes to a request/approval (see also "Changing requests or approvals" on page 18).
- Acknowledge a change made by your partner (see "Acknowledgment" on page 20). In the information system you can acknowledge a change on the top outline level too. If you do this, you implicitly also acknowledge all changes made below the node.
- Send a message (see "Sending a message" on page 20).
- Delete a request/approval (see "Deleting requests/approvals" on page 21).
- Display or print the log (see "Log" on page 21 and "Printing logs" on page 42).

Exporting data

The data in the project and resource views and in the availability table can be exported. An image of the data is generated and can be loaded in Microsoft Excel. The image contains only the data shown in the current expanded or collapsed status of the view. You should therefore expand or collapse the view to suit your needs before you export data.

The exported data is written to a file in CSV format. When you open the file in Microsoft Excel, you can edit the data using the functions of the Excel program.

Choose the menu items *File* → *Export* → *Export top half* or, if the availability table is shown, *File* → *Export* → *Export bottom half*. The *Export File* dialog box opens.

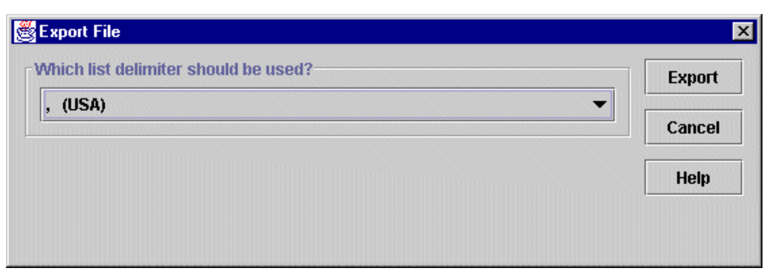


Figure 12: Selecting delimiters for data fields

The data fields exported from RPlan are character-delimited so that they can be loaded correctly into Microsoft Excel. Choose the list delimiter valid for your country and click on *Export*.

In the dialog box then shown choose the appropriate drive and folder and enter the name of the file in the File name field. Click on *Save* to start export and generate the export file.

Make sure that you open the CSV file only within the Microsoft Excel application so that the data is displayed correctly. If you open the file in a file manager or by means of a link, e.g. a desktop shortcut, the data may not be displayed correctly.

Ease of use through favorites lists

Users of RPlan often need the same resource schedules or resources/pools for information purposes or for processing. Standard combinations of schedules can be stored as favorites lists in RPlan. By selecting the appropriate favorites list you can open several resource schedules in different projects or resources/pools in different departments by means of a single mouse click.

As project supervisor you can, for example, combine favorites lists of resource schedules, or as resource supervisor you can combine favorites lists of resource objects (resources/pools). How you combine resource schedules into favorites lists and how you process them is described below. Resource objects are combined into favorites lists and processed in exactly the same way.

Saving favorites lists in the selection dialog

To save a favorites lists, you must first open the *Select Schedule* dialog box by choosing the menu items *File* → *Open* or by clicking on the *Open* icon. Place all the schedules you want to include in the favorites list in the selection list. Now click on the *Save* button

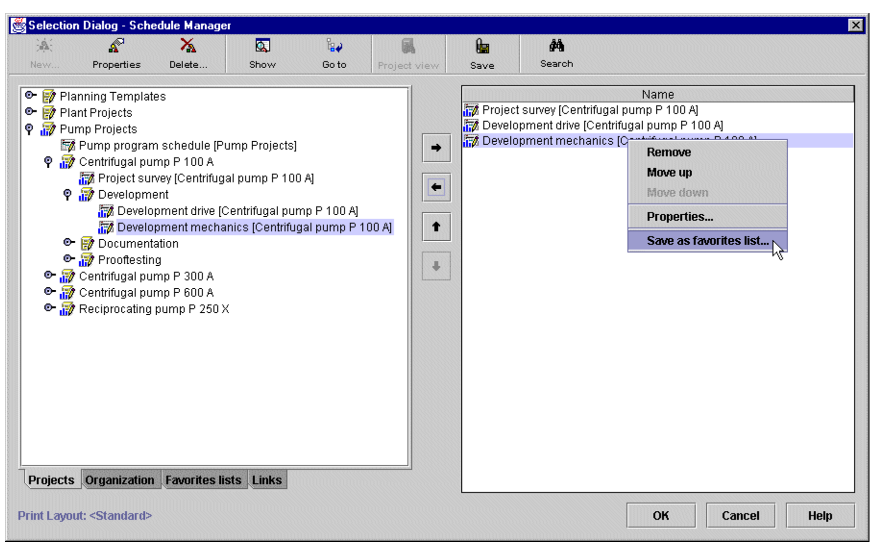


Figure 13: To save a favorites list, choose *Save As* favorites list... in the context menu ...

...

Enter a name for the favorites list in the *New (Resource Manager View)* dialog box. If necessary, you still have the opportunity to change your object selection here using the *Add* and *Delete* buttons. You can also change the order of the schedules using the arrow buttons (Figure 14).

...

Favorites lists are customized settings available only to their owners and creators. However, you can also assign a favorites list to one or more partners – to a supplier for example. To do this, click on the *Select* icon in the *Owner* field and choose the appropriate person in the organization tree. The partner can see the favorites list with your schedules but cannot change the properties of the favorites list.

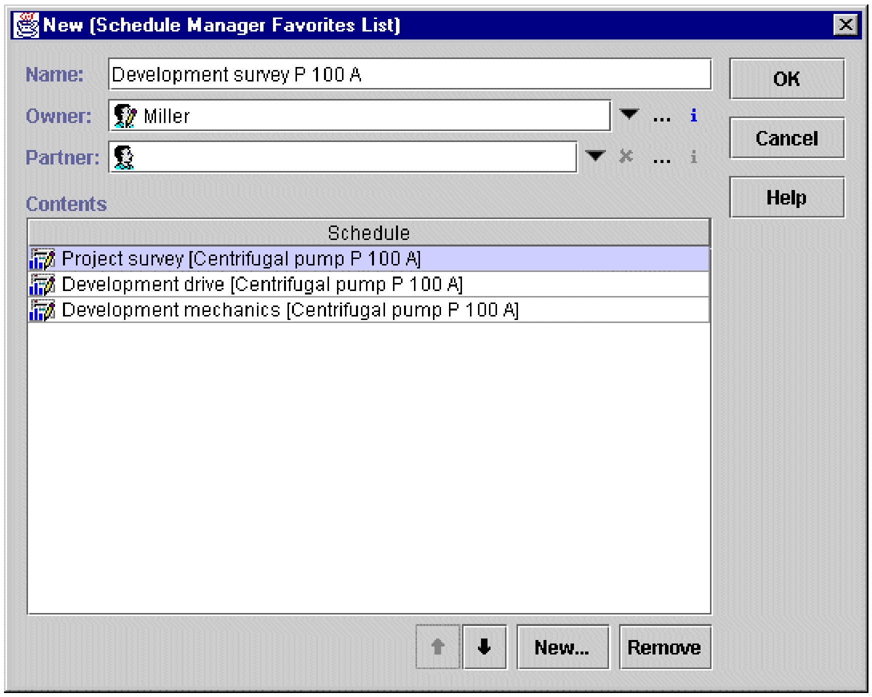


Figure 14: ... and enter a name for your favorites list.

If there are several partners, they cannot all be shown in the Partner field. To view all the partners, click on the selection button. All partners are then shown in the selection list of the Selection dialog box.

Selecting favorites lists

To open a favorites lists, choose the *Favorites lists* tab in the selection dialog box, highlight the desired view andclick on the arrow button (Figure 15). All schedules belonging to the view are added and then opened when you click on *OK*.

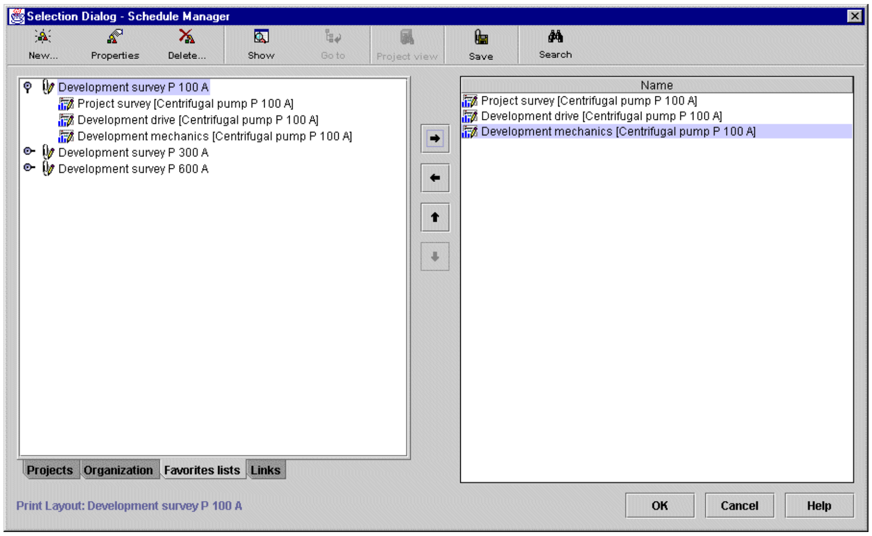


Figure 15: Selecting a favorites list

Changing favorites list properties

The name, owner and contents of an existing favorites list can be changed at any time as follows:

1. Open the *Select Schedule* dialog using the menu items *File* → *Open* or the *Open* icon.
2. Switch to the *Favorites lists* tab.
3. Highlight the favorites list to be modified and choose the *Properties* button. You can make the following changes in the *Properties* dialog box (Figure 17):

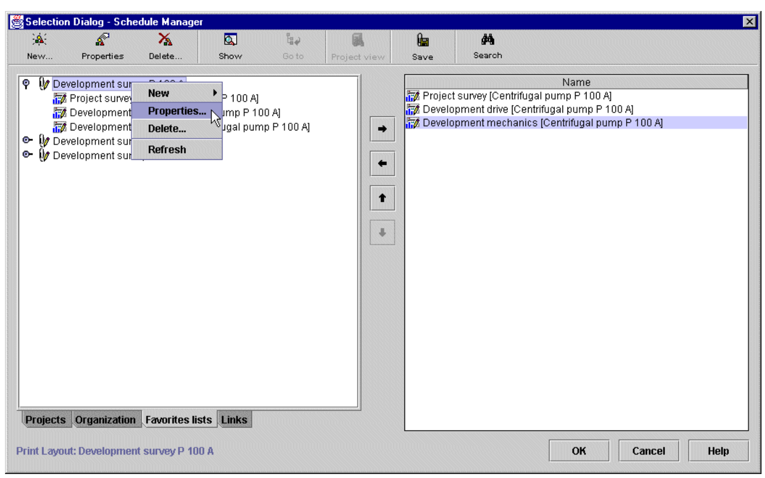


Figure 16: Invoking favorites list properties

Change owner
Click on the selection button in the *Owner* field and choose a new owner in the organization tree.

Add object
Click on *New*.

Delete object
Highlight a schedule in *Contents* and click on *Remove*.

Sort objects

Highlight a schedule in *Contents* and click on one of the two arrow buttons to move the schedule up or down one position.

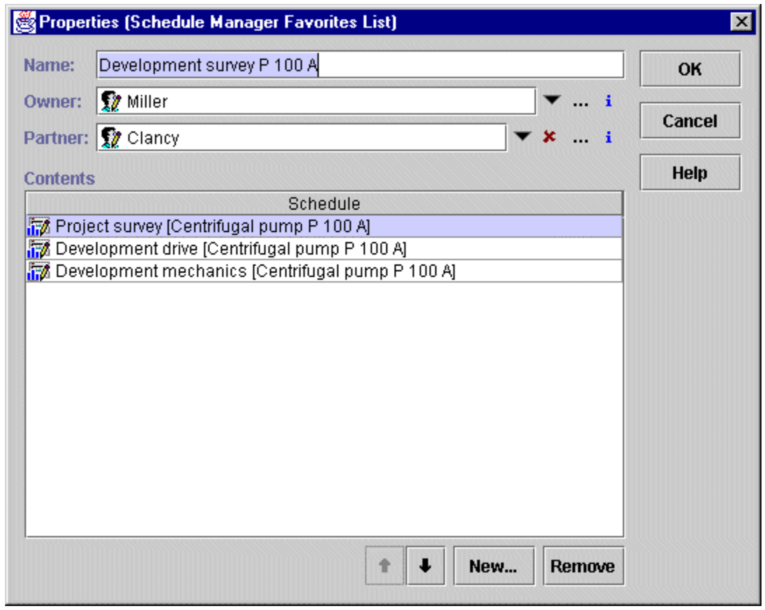


Figure 17: Adding further schedules to a favorites list

4. Confirm your changes with *OK*.

Deleting a favorites list

Open the *Select Schedule* dialog box using the menu items *File* → *Open* or the *Open* icon and switch to the *Favorites lists* tab. Highlight the favorites list to be deleted and click on the *Delete* button.

Chapter
2

Printing

Printing

You can print out project, resource and availability views as well as logs.

Preparing the layout

Most project, resource and availability view settings are reflected in the printout. You should therefore arrange the views (see settings below) as you want them to appear in printed form.

- Screen boundary between the table section and the calendar
- Column widths in the table section and in the calendar
- Outline level of the table (expanded/collapsed)
- Zoom factor of the calendar (in/out)

Page setup

You can define print parameters in the *Page Setup* dialog box. The view for which you have opened the dialog box is shown in the title bar of the Page Setup dialog box. The parameters you specify here apply only for the current session. When you exit RPlan and log on again later, this dialog box contains default values. You make your settings on the tabs (see "General tab" on page 37, "Header and Footer tabs" on page 38 and "*Page* tab" on page 39).

Choose *File* → *Page Setup* to define print parameters. The *Page setup* dialog box is shown: (Figure 18).

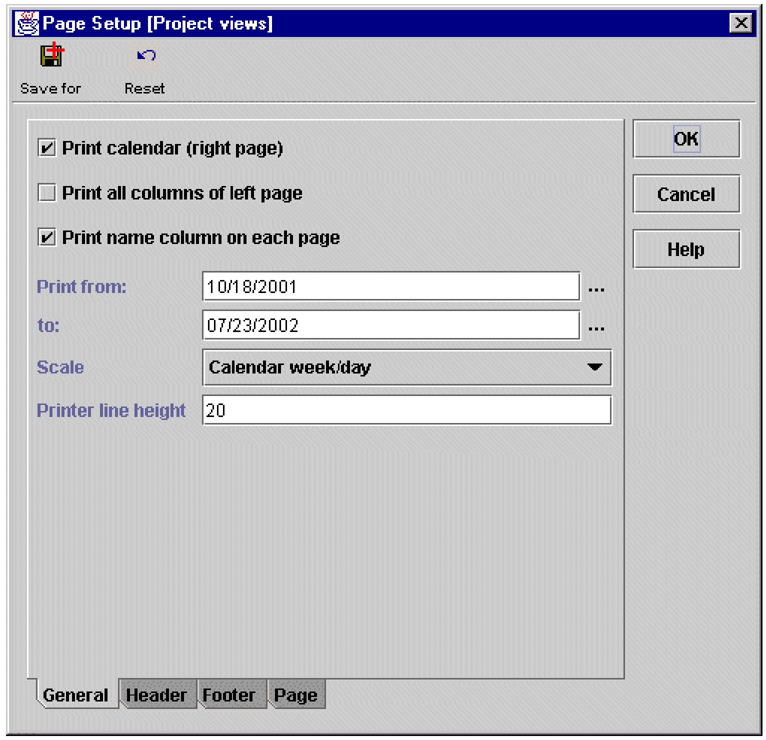
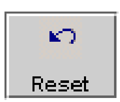


Figure 18: General options available in *Page Setup*

The following functions are available via the icons of the *Page Setup* dialog box:

Save for: This function lets you save a page setup for a view(see "Saving page setup settings" on page 41).



Reset: This restores the settings of the *Page Setup* dialog box to their default values.

If you called the *Page Setup* dialog box from the print preview, the following icon is also displayed.

Preview: This icon lets you view changes just made in the print preview without closing the dialog box first (see "Print preview and printing" on page 39).

General tab

- **Print calendar:** The right side of the resource or project view is included in the printout.
- **Print all columns of left page:** All columns on the left side of the resource or project view are printed, regardless of where the window boundary is currently situated.

- **Print name column on each page:** The name column is printed on each page. In a large document this makes it easier to relate the data to the correct schedule or resource.
- **Print from**: Start date of the print period
- **To**: Finish data of the print period
- **Scale**: You can adjust the zoom factor using this selection list.
- **Print line height**: Here you define the line height for printing. The height applies for printing only.

The following option is available if you called the *Page Setup* dialog box from the print preview of the project graphic or availability graphic.

- **Fit graphic to page**: This reduces the project or availability graphic so that it fits exactly into a full page. The timescale remains unchanged.

Header and Footer tabs

Deactivated text

Does the text for the header/footer appear against a light gray background in the *Page Setup* dialog box with the result that it cannot be edited? If so, select the *Print Header* or *Print Footer* option on the *General* tab.

These tabs let you determine the contents of headers and footers. The text of the header or footer is displayed on sub-tabs named Left, Center and Right. These tab names indicate the position of the text on the header or footer. Information on the user and element to be printed out is included by default on these tabs. You can overwrite or supplement this information.

- **Print header** determines whether the printout is to have a header.
- **Print footer** determines whether the printout is to have a footer.
- **Left**, **Right**, **Top**, **Bottom**: These options let you define where a border is printed in the header/footer. If all four options are selected (default), a border is printed all round the header/footer.

Selecting a font

...

You can set the font individually for the header and footer areas. Click on the selection button. You are shown a dialog box which lists the fonts available in your system. Choose the font, font style and font size you want and confirm with OK.

Automatic entries

RPlan provides you with a number of automatic entries (AutoTexts) for headers/footers. These are stored in fields. You can add fields to the left, center or right area of headers/footers. The contents of these fields are included in printouts.

You can design headers/footers according to your own wishes using AutoTexts and your own texts. Choose the area in the header/footer where you want to add an AutoText. Choose the desired field in the Field selection list and click on Add. A code is inserted for each AutoText in the text field of the relevant area. If you have called the Page Setup dialog box from the print preview, you can click on Preview to see how your choice looks in plain text. You can enter not only AutoTexts but also you own texts in the text field. If you insert your own text next to an AutoText, you must ensure that the code for the AutoTexts is not changed or inadvertently overwritten because this would prevent the AutoText from being displayed. The remaining code would be displayed instead.

You can also select a line as an AutoText in order, for example, to separate two entries. Automatic spacing is inserted below the line but only if there is a paragraph mark after the line field. If you want to insert spacing above the line, you must insert a paragraph mark above the line.

Not all automatic entries can be shown for all objects to be printed. The fact that an automatic entry cannot be shown for a range is indicated by a hyphen "-" in the footer/header.

Page tab

You define the paper size, orientation and page margins on this tab. You can view the effects of your settings in the preview field.

- **Paper size**: Select the paper size for your printout from this selection list.
- **Orientation**: Specify the orientation for your printout (portrait or landscape).
- **Left**, **Top**, **Right**, **Bottom margin**: Enter a numeric value for each page margin.

Print preview and printing

Choose the menu items *File* → *Print* → *Print upper part* or, if an availability view or standard graphic is displayed, *File* → *Print* → *Print lower part.* If you have made changes but have not yet saved them, you are prompted to do so now. If you confirm the prompt, the changed data is saved before printing. If you do not confirm the prompt, the changed data is not saved but printing still takes place. The print preview for your print job is opened. Navigate through the page preview and check whether the layout is in accordance with your wishes. You can change the size of the print preview by clicking in it (the mouse cursor takes the shape of a magnifying glass). The preview display toggles between whole page and the actual size of the page.

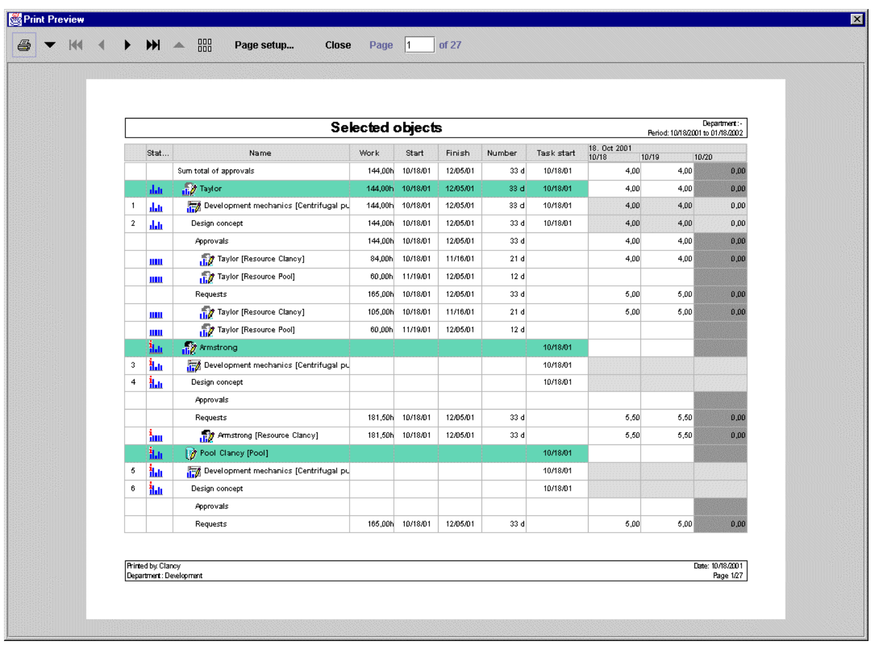
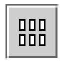


Figure 19: Print preview of the top section



If you click on the *All pages* button, all pages are shown as pictograms in an overview. Clicking on the button again or double-clicking on a pictogram returns you to page display.

If you print a project or availability graphic which contains the data of more than one schedule or resource/pool, a key identifying the elements of the graphic is printed on a separate page (the last page of the print job).

To make changes to the overall layout (e.g. expanded/collapsed status of the current view), exit the print preview using *Close* and change the layout in the project/resource view.

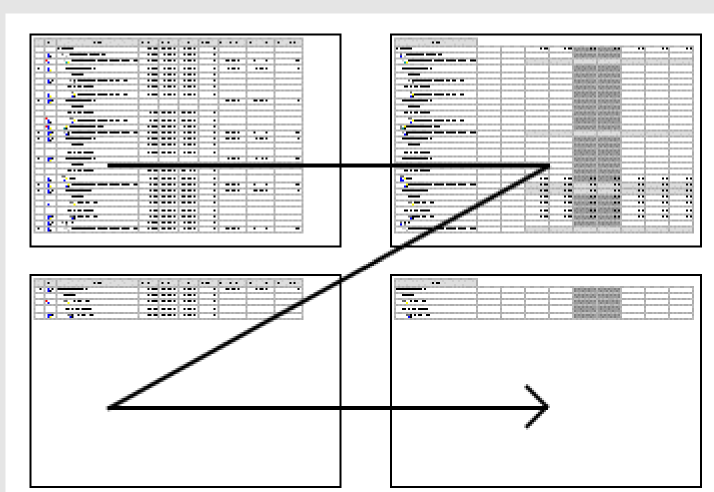
Click on the *Print* icon in the print preview. You can send the print job direct to the printer, or save it as a PDF or Postscript file.

- **Printer:** If you choose this option, a print dialog box opens whose appearance differs according to the system you are working with. Select the desired printer and, if necessary, additional options. Confirm the print dialog.
- **PDF file:** If you choose this option, you are requested to enter the name of the file and its save location. Choose the drive and directory and type the name of *the file* in the File name field. *Confirm* your input with *Save.*

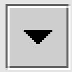
  The advantage of this form of output is that you can save print jobs to PDF files and print them out later as required. You can open, read and print PDF files using the Adobe Acrobat Reader (free download at www.adobe.com). You can also quickly and simply attach PDF files to e-mails and send them to other members of staff.
- **Postscript file**: This option lets you redirect the print job to a Postscript file. You can save the file as a PS (Postscript) or EPS (Encapsulated Postscript) file. Choose the appropriate drive and folder and enter the name of the file in the *File name* field. Choose the desired format in the *File type* selection list and confirm your input with *OK*.

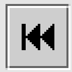
Navigation in the print preview

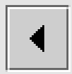
You can navigate in the preview using the arrow buttons in the toolbar. If the data to be printed extends over more than one page, printing is carried out in a predefined order: from left to right and then down, then starting again from the left.

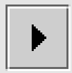


In the print preview you can therefore navigate to the left, right, up and down.

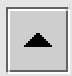
 Scroll down one page

 Scroll to first page

 Scroll back one page

 Scroll forward one page

 Scroll to last page

 Scroll up one page

Saving page setup settings

You can define and save a custom page setup (e.g. position and contents of header/footer, page margins) as a print template for a view. You can then use the template each time you print the view. Page setup affects only the appearance of the page, not its contents.

You can save a custom page setup for the project view, resource view, and logs.

You can also save a page setup for each favorites list. To do this, you must first load the favorites list.

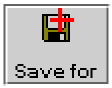
Saving a page setup for a view or favorites list

1. Display the view or open the favorites list for which you want to define a page setup and choose the menu items *File* → *Print* → *Print top half* or *File* → *Print* → *Print bottom half*, or click on the Print icon in the toolbar.
2. Call the *Page Setup* dialog box in the print preview by clicking on the *Page setup* button.
3. Arrange the page setup according to your wishes in the *Page Setup* dialog box (see "Page setup" on page 36). Click on the *Preview* button to view changes you make to the page setup.
4. Once you have completed page setup, click on the *Save* for icon and choose the view for which you want to save the page setup.

Saving a page setup for several views

You can save a page setup for all views and the logs. In this case, all your printouts – with the exception of the favorites list – have the same page layout.

1. In a view choose the menu items *File* → *Print* → *Print top half* or File → *Print* → *Print bottom half*, or click on the *Print* icon in the toolbar.



2. Call the *Page Setup* dialog box in the print preview by clicking on the *Page setup* button.
3. Arrange the page setup according to your wishes in the *Page Setup* dialog box (see "Page setup" on page 36). Click on the *Preview* button to view changes you make to the page setup.
4. Use the *Save for* icon to successively save the page setup for the applicable views.

Printing logs

In the resource/project view or in the information system highlight the schedule, task, or resource whose log you want to print. Choose the menu items *Resources* → *Log* or *Log* in the context menu.

If you have selected the log of a schedule or task, the print preview is displayed immediately. If you have selected a resource, you are prompted to restrict the period for the resource.

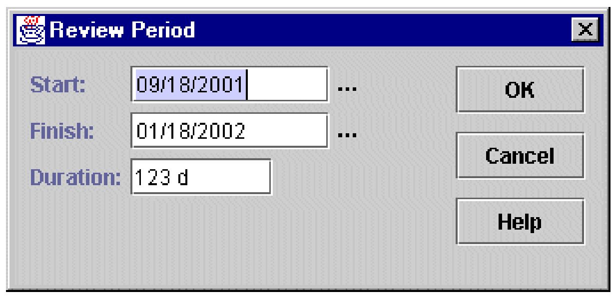


Figure 20: Restriction of the period under consideration/print period

Restrict the period using the *Start* and *Finish* fields and click on *OK*.

The print preview for the log is displayed.

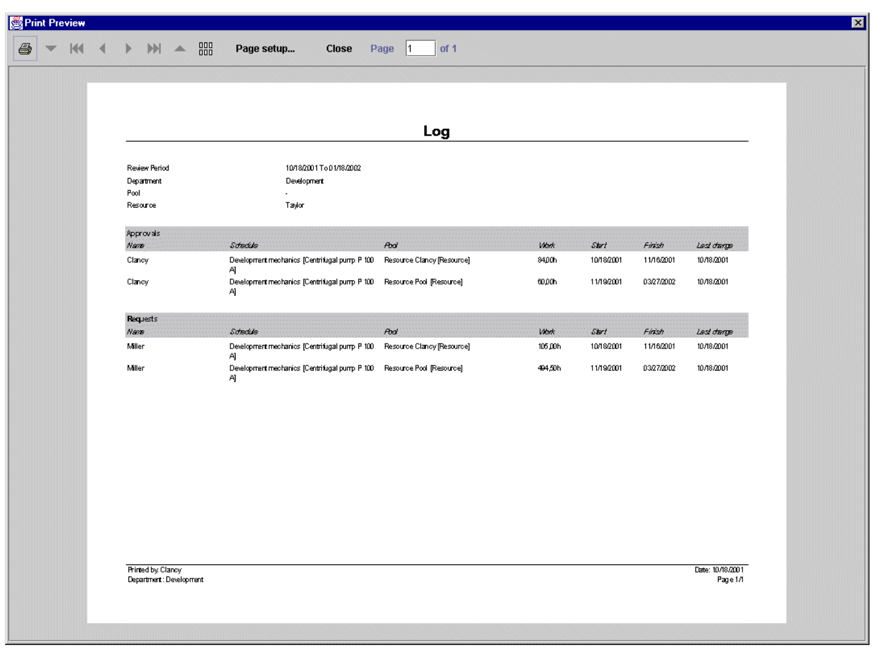


Figure 21: Print preview of the log

The print preview first shows the log overview with the header and the approval and request areas (see "Log" on page 21). If you want to print the overview only, start printing immediately by clicking on the Print icon.

To view and print the individual actions, click on the *Page setup* button and select the *Print history* function. You can restrict the print period using the *Print history from* and *Print history to* fields. If you leave both fields blank, all actions are displayed and printed. To enter a start or finish date, click in the checkbox of the appropriate field and type in a date or choose a date using the selection button. You can start printing once you have specified the print period.

When you print logs, you can direct print output not only to a printer but also to a PDF or Postscript file.

Click on the *Print* icon to display the available print options.

- **Printer:** If you choose this option, a print dialog box opens whose appearance differs according to the system you are working with. Select the desired printer and, if necessary, additional options. Confirm the print dialog.
- **PDF file:** If you choose this option, you are requested to enter the name of the file and its save location. Choose the drive and directory and type the name of the file in the *File name* field. Confirm your input with *Save.*
- **Postscript file**: This option lets you redirect the print job to a Postscript file. You can save the file as a PS (Postscript) or EPS (Encapsulated Postscript) file. Choose the appropriate drive and folder and enter the name of the file in the *File name* field. Choose the desired format in the *File type* selection list and confirm your input with *OK*.

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